

# Creating a Fee Determination Due Alert

This alert indicates the active clients where a periodic fee determination is due.

1. **Getting here:** Login, on the Navigation Pane (left menu) select **Agency** to activate the Agency List menu.
2. Select **Alerts Configuration**.
3. Select **Add New Alert**.

The screenshot shows the Idaho-WITS Training interface. On the left, the 'Agency' menu is expanded, and 'Alerts Configuration' is selected. In the main area, the 'Agency Search' page is displayed, showing a table of agencies. A red circle with the number '1' is placed over the 'Agency Search' header, and a red circle with the number '2' is placed over the 'Alerts Configuration' menu item.

Name	Display Name	Description
SA Administrative Agency	Admin Agency	Administrator
D7 Treatment Program	D7 Treatment	
Department of Health & Welfare	State DHW	
Idaho Department of Corrections	IDOC	
Wood Pilot Project	Wood Pilot Proj	
SUD Provider Training Agency	SUD Prov Train	
Women's and Children's Alliance	WCA	
IDHW, AMH Training Agency	AMH Training	
IDHW, DBH, Region 1	DBH, Region 1	
IDHW, DBH, Region 2	DBH, Region 2	
IDHW, DBH, Region 3	DBH, Region 3	
IDHW, DBH, Region 4	DBH, Region 4	
IDHW, DBH, Region 5	DBH, Region 5	
IDHW, DBH, Region 6	DBH, Region 6	
IDHW, DBH, Region 7	DBH, Region 7	

The screenshot shows the 'Alert Configuration' page in the Idaho-WITS Training system. The 'Alert Configuration List' table is visible, and the 'Add New Alert' button is highlighted with a red circle and the number '3'.

Alert Type	Alert Name	Levels of care	Include case w/o LOC	Active	Assigned to Staff Type	Facility Excluded	Actions

4. Enter **Alert Name**.

5. Select **Periodic Fee Determination Due** as the **Alert type**.

6. Enter the message in **What message should appear to users?**

7. Complete these fields.

8. Select any **Facilities** this alert *will not* apply to. Use the greater than sign (>) to move them to the box on the right.

9. Enter the **Number of Days** you want this alert to show.

10. Enter the **Effective Date**.

11. Select **Finish**.

The screenshot shows the 'Agency Alert Configuration Profile' form. It includes fields for Configuration Type (Agency), Alert Name (Periodic Fee Determination Due), Trigger Point (Last Fee Determination Effective Date), Alert Description (Indicates the active clients where a periodic fee determination is due), and What message should appear to users? (Annual Fee Determination Due). There are also fields for Agency Type, Alert Type (Periodic Fee Determination Due), and Alert Category (Client). A section for 'When is the next activity due (days after the trigger point)?' has a value of 364. A section for 'How many days prior to the due date should this alert show up?' has a value of 30. A section for 'Which staff should receive the message?' has a value of Case Assigned To. A section for 'Should message turn red when overdue?' has a value of Yes. A section for 'Which facilities follow these rules:' has a list of facilities (Treatment Location 1, Treatment Location 2) and a box for 'Excluded Facilities' with the text 'This is only for facilities you want excluded from this alert'. A section for 'Alert should stop being displayed this many days after it is generated:' has a value of 364. The Effective Date is 3/11/2014. The Expiration Date is empty. At the bottom right are buttons for Cancel, Save, and Finish.

Agency Alert Configuration Profile

Configuration Type: Agency

Alert Name: Periodic Fee Determination Due

Trigger Point: Last Fee Determination Effective Date

Alert Description: Indicates the active clients where a periodic fee determination is due

What message should appear to users?: Annual Fee Determination Due

When is the next activity due (days after the trigger point?): 364

How many days prior to the due date should this alert show up?: 30

Which staff should receive the message?: Case Assigned To

Should message turn red when overdue?: Yes

Which facilities follow these rules:

Effective for these Facilities: Treatment Location 1, Treatment Location 2

Excluded Facilities: This is only for facilities you want excluded from this alert

Alert should stop being displayed this many days after it is generated: 364

Effective Date: 3/11/2014

Expiration Date:

Cancel Save Finish